

# Natural Personal Care 2010:

## Global Market Analysis and Competitive Brand Assessment

### 4th Edition

**Published January 2011**

**Base Year: 2010**

#### Regional Coverage

Asia

Europe

Latin America

United States

A comprehensive analysis of the global market for natural personal care products, focusing on key trends, developments, challenges, business opportunities, and natural ratings, and addressing such issues as:

- What is the definition of "natural"?
- How big is the market for truly natural products?
- Which brands are actually natural in terms of the ingredients they use?
- Where are the opportunities for personal care marketers?

Features sustainability ratings, green scores, and a new interactive online database.

# Natural Personal Care 2010: Global Market Analysis and Competitive Brand Assessment

## Report Scope

*Natural Personal Care 2010: Global Market Analysis and Competitive Brand Assessment* is a comprehensive analysis on the global natural and organic personal care market. By examining the key players and the ingredients they use, Kline's report uniquely separates the market into two distinct segments: truly natural products and those that are simply inspired by nature.

This report considers brands to be natural if they are formulated with a high proportion of ingredients that comply with our definition of natural. We devised a proprietary 10-point scale that rates each of the brands analyzed in this report on its degree of "naturalness."

This report is offered as one volume encompassing four regions: Asia, Brazil, Europe, and the United States. Subscribers have the option of purchasing the entire report or select regions. The Asia region covers all of Asia with a focus on China, India, Indonesia, and Japan. The Europe analysis covers all of Europe with a focus on France, Germany, Italy, Russia, Spain, and the United Kingdom. The global summary also provides an estimate of the rest of the world so that truly global sales are given.

The report provides subscribers with competitive intelligence on the key players in the natural and organic personal care products market. It gives information and insights that enables subscribers to exploit business opportunities by understanding historic and projected growth, market drivers, product developments, competitive forces, and future trends.

Due to the fragmented nature of the natural personal care market, there are hundreds of players in this dynamic market. We have segmented the players into two tiers: global and regional brands. The global brands are profiled comprehensively each year. These global brand profiles also include green score and sustainability ratings. Regional brands are also examined, but the profiled brands change in each edition, and the profiles are less detailed. Charter subscribers have the opportunity to provide input in selecting the regional brands that will be profiled.

## What's New

*Natural Personal Care 2010: Global Market Analysis and Competitive Brand Assessment* is available through a Web-based format for easy access anywhere in the world. Subscribers have unlimited access to the report data and written contents through a sophisticated but easy-to-use database, with the following capabilities:

- Search capabilities by company, brand and region
- Flexible search options
- Subtotaling abilities
- Easy access and downloading of sales, market shares, growth rates, and forecasts

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### Key Benefits

To identify the opportunities in this booming but hard-to-track sector, marketers should fully understand the companies that participate in it. For many traditional personal care marketers, there are acquisition opportunities to examine. For raw materials suppliers, this report provides an understanding of their customers and the formulations they use.

Kline is unique in its ability to leverage the skills and synergies of its global Specialty Chemicals and Consumer Products practices. Our firm is the only consultancy that covers the whole personal care value chain, from raw materials to finished goods. Professionals from both practices conduct research and analysis for this study to deliver a report that is insightful from both a raw material and finished goods perspective.

The report enables subscribers to:

- Assess the global natural personal care market and understand the key differences between the various countries
- See clearly through the marketing hype to understand the difference between nature-inspired and truly natural products
- Make decisions on business opportunities and marketing/sales plans
- Identify potential strategic alliances, acquisition candidates, and/or customers
- Augment business plans with reliable insights and data

Subscribers also receive one day of consultation time with members of the research team. This time can be used for strategic planning assistance or to explore specific or related industry information not covered in the report.

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## Database Contents and Features

### DATABASE CONTENTS

- Total industry size and growth
- Sales by region and country for the countries listed in Table 1.
- Breakdowns for 2009 and 2010 by:
  - Region
  - Country
  - Product Class
  - Brand
- Forecast sales to 2015

### DATABASE FEATURES

- User-friendliness in a simple yet sophisticated system
- Data presented by:
  - Brand sales
  - Market share
  - Growth rates
- Flexible search options
- Export capabilities
- Ability to easily refine and modify search

## Report Contents

### 1. INTRODUCTION

*This chapter describes the format, scope, and methodology of the report. It also includes the definition of natural and Kline's proprietary naturalness rating and sustainability rating scales.*

### 2. GLOBAL EXECUTIVE SUMMARY

*This chapter provides a comprehensive overview of the worldwide natural personal care market in terms of sales, natural and sustainability ratings, competition, regional differences, key lessons learned, and opportunities.*

### 3. REGIONAL INDUSTRY OVERVIEWS

*For each region listed in Table 1, this section provides an overview of key industry statistics and trends, including:*

- Total industry size and growth
- Breakdowns of natural-inspired vs. truly natural products
- Market drivers and trends
- Product class and country breakdowns for each individual country, and key players
- Product and ingredient trends
- Competitive landscape
- **NEW!** Acquisition attractiveness mapping
- Natural ratings
- Channels of distribution
- Certification standards
- Key lessons learned
- Outlook to 2015

### 4. GLOBAL BRAND PROFILES

*Detailed global profiles for approximately 10 key brands/companies marketing natural personal care products, as listed in Table 2.*

*The following information is provided:*

- Company overview
- Manufacturer sales and growth for 2010
  - Sales by country
  - Sales by category
  - Retail sales
- Green score - a score combining the brand's natural and sustainability ratings
  - Naturalness rating
  - Sustainability rating and analysis
- Product offerings
- Distribution
- Marketing activities
- Outlook to 2015

### 5. REGIONAL BRAND PROFILES

*Brief one-page profiles provide for approximately 20 smaller brands/companies marketing natural personal care products in each region, as shown in Table 3. Information includes company overview, sales, naturalness rating, product offerings, distribution, and future outlook. Profiled brands vary from edition to edition so that more brands can be examined.*

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**Table 1: Regions Covered in the Study**

- Asia (focusing on China, Japan, Indonesia - New this year! - and India)
- Brazil
- Europe (focusing on France, Germany, Italy, Russia, Spain, and the United Kingdom)
- United States

**Table 2: Brands Profiled on a Global Basis**

- Aveda (Estée Lauder)
- The Body Shop (L'Oréal)
- Burt's Bees (Clorox)
- Dr. Hauschka
- Jurlique
- L'Occitane
- Oriflame
- Origins (Estée Lauder)
- Weleda
- Yves Rocher

**Table 3: Brands Profiled on a Regional Basis**

Asia	Brazil	Europe	United States
Ayura	Amazônia Natural	Alverde	100% Pure
Ayush	Bain de Terre	BcomBio	Avado Organics
Bamboo Salt	Bioessência	Cattier	Avalon Natural Products
Banphool Tel	Casa Granado	Demain Nature	Crème of Nature
Bawang	D'Arôme	Estelle & Thild	Derma E
Chandrika	Ecologie	Florame	Eo
Dhathri	Éh	Green People	Good Stuff Organics
Do Organic	Folhata	Groupe Lea Nature	Green By Nature
ILCSI Organic	Magia dos aromas	Korres	Head Organics
I-White	Mahogany	Melvita	Intelligent Nutrients
Mistene Cosmetics	Natura	Mirra Lux	Juice Organics
Mustika Ratu	O Boticário	Natura House	Lafe's
Mysore Sandal	Ox	Naturlab	LIERAC
Parachute	Phytoderm	Oskia	Lumene
Pure Earth	Phytoervas	Phyt's	Marina
RMK	Reserva Folio	Primavera	Organic Root Stimulator
Sari Ayu	Sparkkli Home Spa	Provence Santé	Peter Rabbit Organics
Softto	Spas des Jardins	Rawganic	Plant Love
Suzumusi Olive	Surya Brasil	Sanoflore	Shady Day
Tianqi	Vitaderm	Terre d'Oc	Yes To Carrots

# Natural Personal Care 2010: Global Market Analysis and Competitive Brand Assessment

## Methodology

Kline is unmatched in our ability to gather hard-to-get market and competitive intelligence with a high degree of confidence. Kline's market analysis approach places the principal emphasis on primary research techniques to ensure that the foundation of business intelligence and insight is accurate, current, and reliable.

During the course of field research, Kline's professional staff of industry experts conduct in-depth discussions and personal interviews with a wide range of knowledgeable industry participants and opinion leaders, including manufacturers and marketers, distributors and suppliers, and industry associations that cater to the natural and organic personal care products market.

This approach has proven to be the most effective and reliable approach to obtaining accurate market data, capturing expert insights, and identifying business opportunities. Primary research represents the bulk of our research efforts, supplemented by secondary research drawn from the review of suppliers' product literature and price lists, a search of recent trade and technical literature, and Internet sources.

Members of Kline's Specialty Chemicals practice develop the natural ratings based on assessments of the raw material formulations. Ingredient analyses are performed using a representative sample of products from each brand. We assess the degree to which each brand contains natural ingredients and established benchmarks as to what constitutes a truly natural product versus one made with synthetic ingredients.

Kline's Specialty Chemicals practice also performs the new sustainability ratings. Areas examined include carbon neutrality, ingredient sourcing, packaging, manufacturing processes, and social responsibility.

## Kline Credentials

Kline is a worldwide consulting and research firm dedicated to providing the kind of insight and knowledge that helps companies find a clear path to success. The firm has served the management consulting and market research needs of organizations in the chemicals, materials, energy, life sciences, and consumer products industries for over 50 years.

Kline's research and consulting services extend across the entire consumer industry value chain. Our solutions have helped clients develop better ways to create and profit from new business opportunities, respond to competitive and economic threats, improve productivity, achieve sustainable growth, and optimize performance. Kline provides clients with facts, forecasts, and recommendations based solidly on the realities of the market.

Our market research reports and services are designed to provide subscribers with a deeper understanding of their markets, an outlook for their business, and accurate information about their competitors. Our clients tell us they often use Kline's market research to validate their own internal analysis, and many clients rely on Kline reports as their most critical source of information.

For more information about this study or Kline's other services, e-mail us at [sales@klinegroup.com](mailto:sales@klinegroup.com), visit our website at [www.KlineGroup.com](http://www.KlineGroup.com), or contact us at any of our regional offices listed below.

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### Recently published or in-progress research for the Consumer Products industry includes:

- Cosmetics & Toiletries
- Beauty Retailing
- Global Personal Care Ingredients
- Green Cleaning Products
- Professional Skin Care
- Salon Hair Care
- Specialty Actives and Active Delivery Systems for Personal Care